Implementation and configuration of HubSpot CRM at “CreativeFox” – simulation

🔷 1. Project Objective:

To demonstrate my practical knowledge of CRM systems through a simulation of the implementation and management of the sales process in HubSpot. All the configurations below have been used by me in practice.

🔷 2. CreativeFox's Needs:

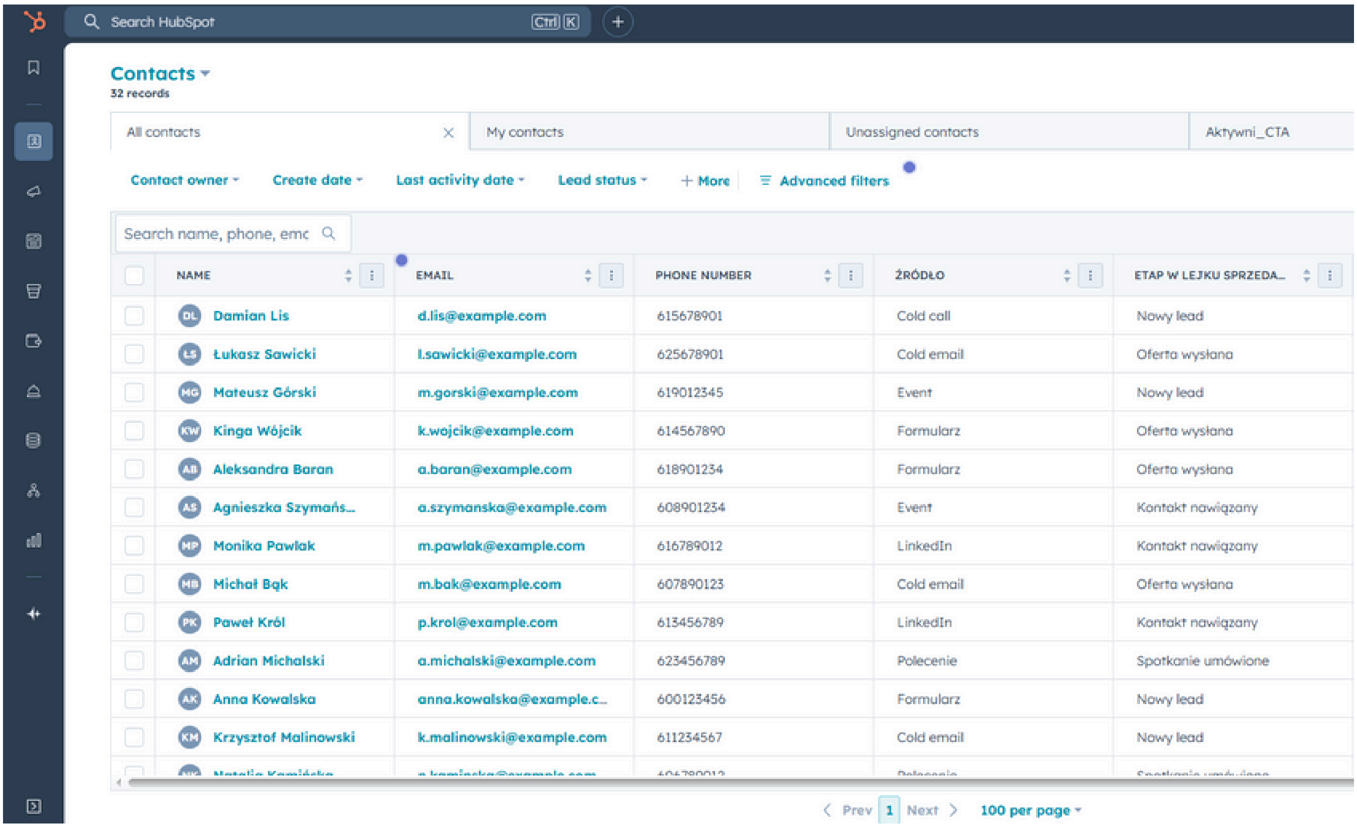
- Collecting leads from a website form
- Sales funnel (from lead to contract signing)
- Automated email follow-ups
- Conversion and lead source reports

🔷 3. Scope of Activities:

- 🗂️ Import and standardization of contact data
- 🏷️ Mapping lead properties (e.g., source, stage)
- 🛠️ Configuration of the sales pipeline (deal stages)
- 📊 Creating reports and dashboards in HubSpot
- 🔍 Contact segmentation by source and deal stage
- 📎 Project documentation (screenshots, descriptions, data)

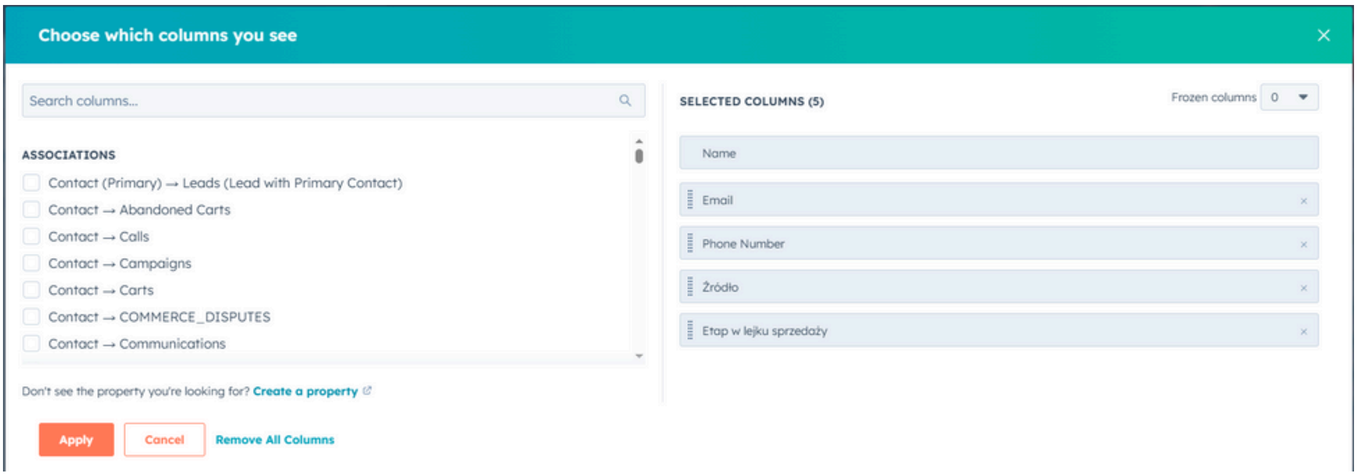
Data import:

At the beginning, I collected contact data and prepared it for import into the CRM system. I cleaned it in Excel – standardizing first names, last names, email addresses, and contact sources. This helped avoid chaos in the database and ensured that each record was accurate and ready for further use in HubSpot. **For the purposes of this material, the contact data is fictional.**



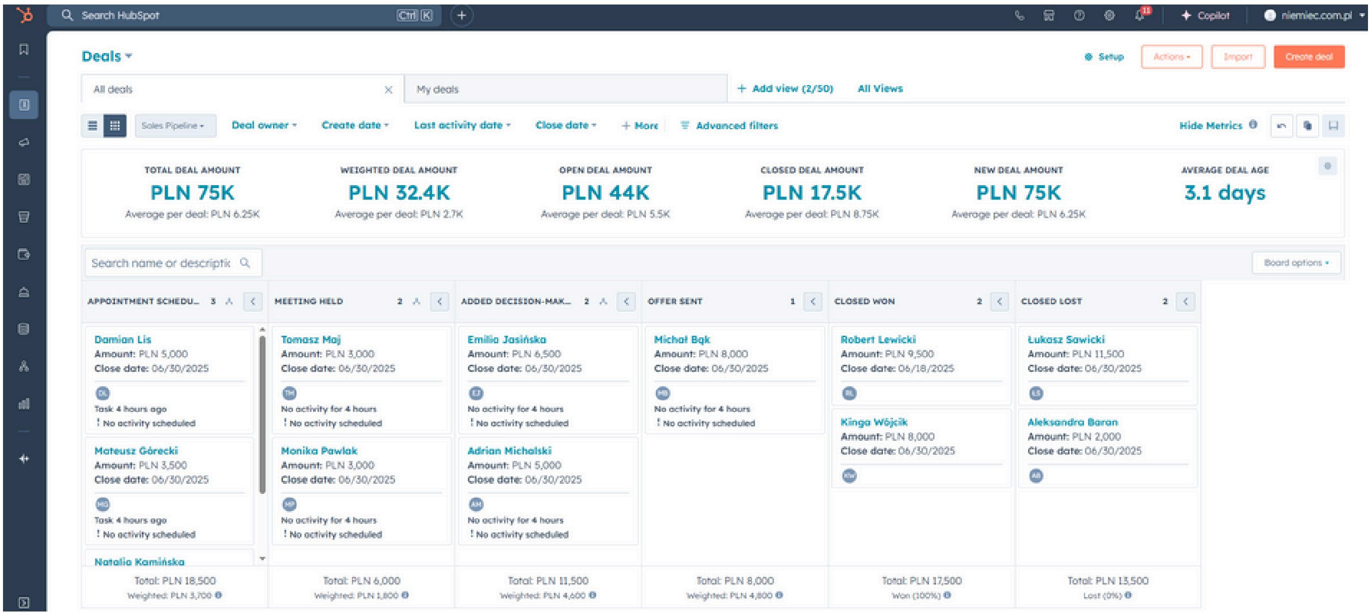
Property Mapping:

Each contact was assigned appropriate properties, such as the **source** of acquisition and **the stage** in the sales funnel. By assigning them manually, I was later able to easily analyze where the **best leads** come from and how their sales journey progresses.



Pipeline configuration – deal stages:

I created a custom **sales funnel** tailored to the simulated process. The stages allowed me to replicate the real flow of deals. This is a key CRM element – it enables tracking progress and better managing the customer relationship.



Configure | Pipeline Rules | Automate | Deal Tags

STAGE NAME	PROBABILITY	USED IN
Appointment Scheduled	20%	3
Meeting held	30%	2
Added decision-maker	40%	2
Offer sent	60%	1
Closed Won	Won	2
Closed Lost	Lost	2

+ Add stage

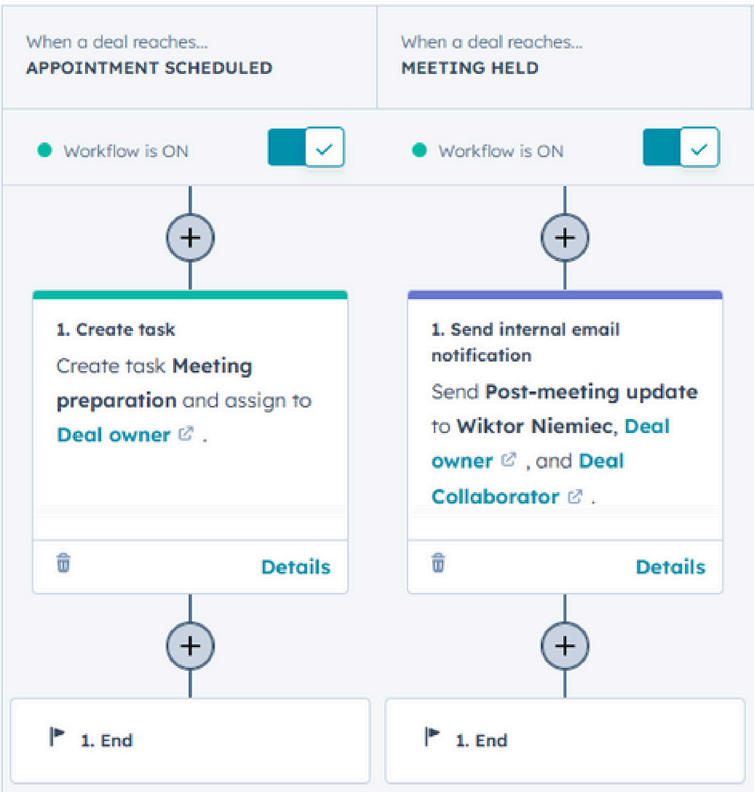
Workflow:

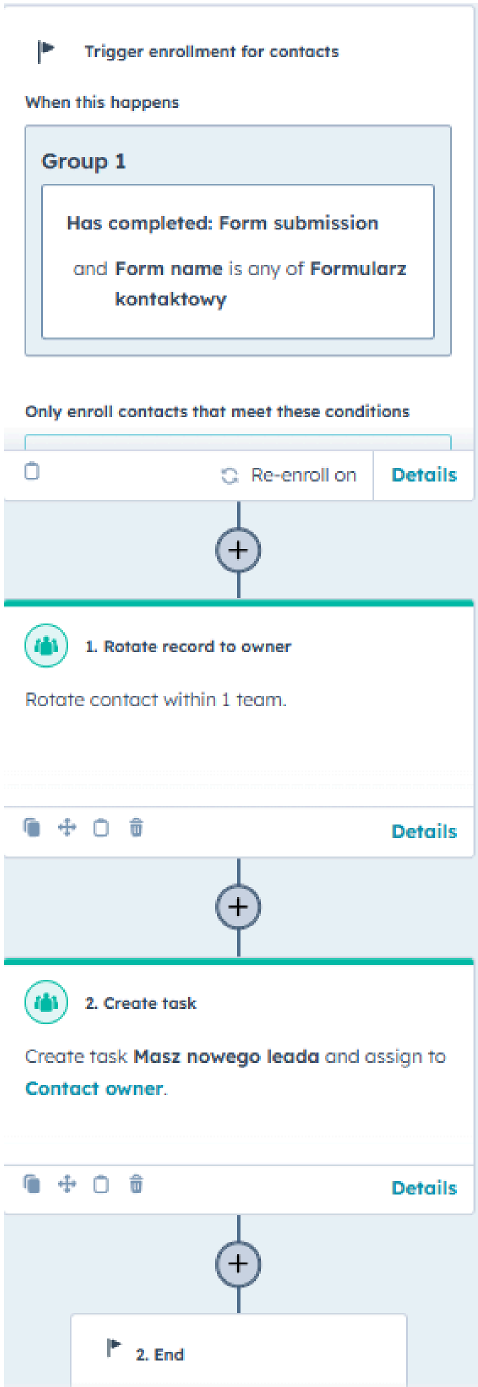
🔁 1. Preparation for the Meeting and Internal Notification After the Meeting

When a contact is moved to the deal stage “Meeting Scheduled,” a task named “Meeting Preparation” is automatically created and assigned to the contact owner.

When the deal stage changes to “Meeting Held,” the contact owner receives an internal notification reminding them to update information (e.g., notes, status).

💡 **Benefit:**
Thanks to this automation, the salesperson will never forget to prepare for the conversation with a potential client and it enables ongoing maintenance of data quality in the CRM.





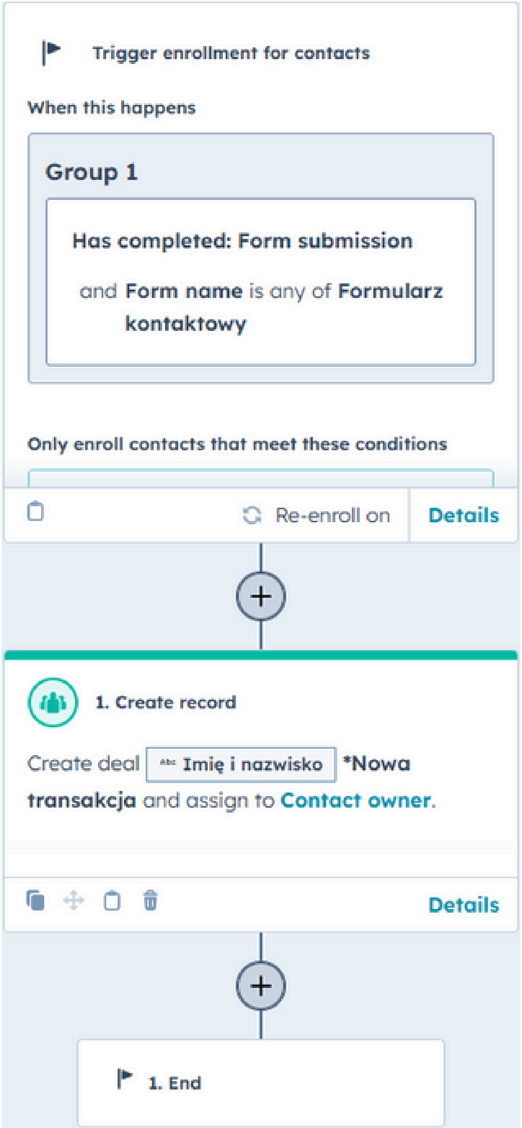
👥 2. Form → Contact Rotation

When a person fills out the form on the website, the contact is automatically assigned to one of the team members (rotation), and a task named “You have a new lead” is created.

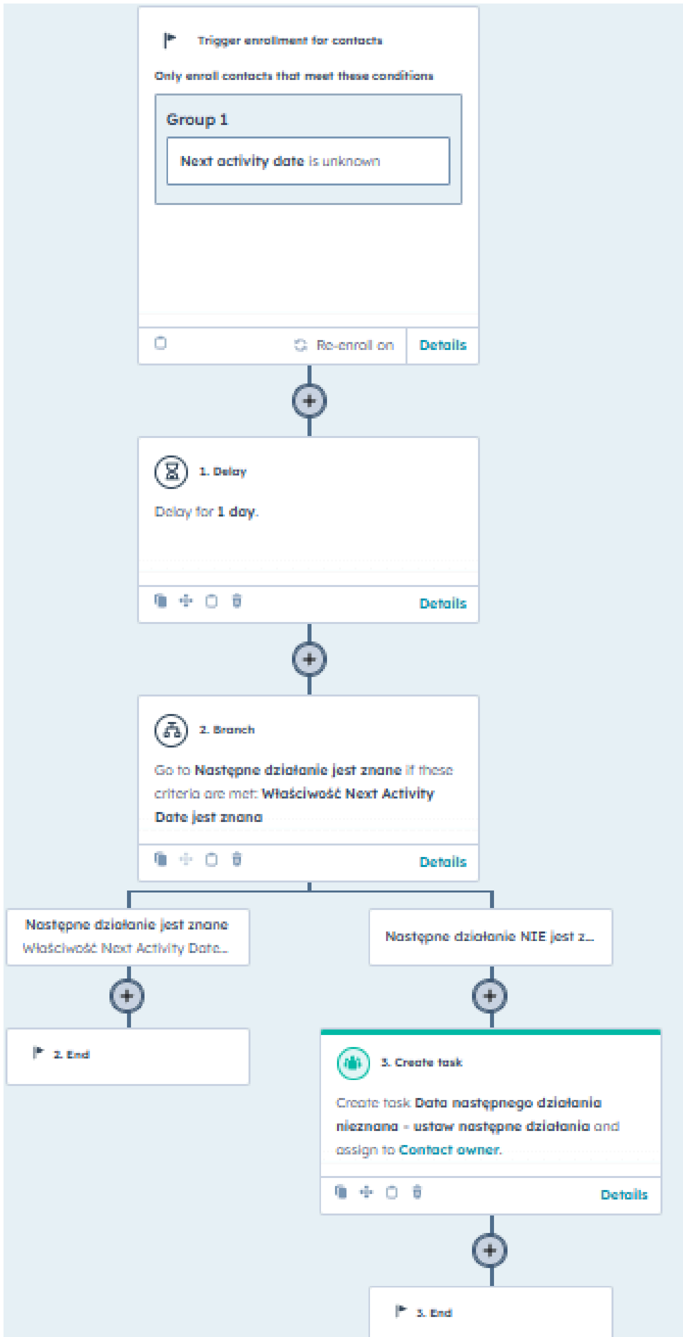
💡 **Benefit:**
New leads are immediately distributed and visible to the team, which significantly speeds up response time. No one is overlooked.

📝 3. Form → Deal Creation

After the form is submitted, the system creates a deal named with the contact's first and last name + "New Deal" and assigns it to the contact owner.



💡 Benefit:
The lead not only enters the CRM but a deal is immediately opened for them – saving time.



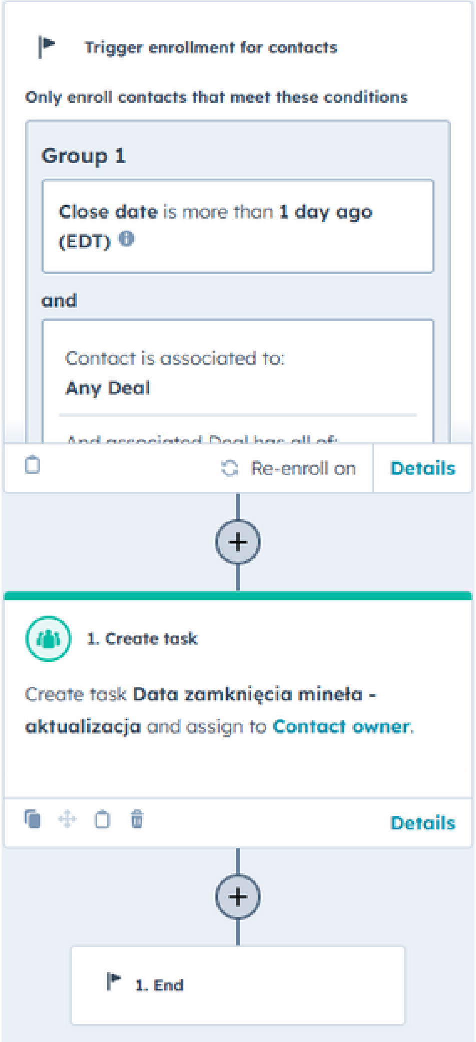
⏳ 4. Missing Next Activity Date

If the next activity date for a client is not set:
The workflow waits 1 day.
If the date is still missing → a task is created: "Next activity date unknown – set next activity," assigned to the contact owner.

💡 Benefit:
Minimizes the risk of contacts getting stuck in the funnel without decisions or actions. The system reminds about taking the next step, which improves sales effectiveness.

⏰ 5. Outdated Data

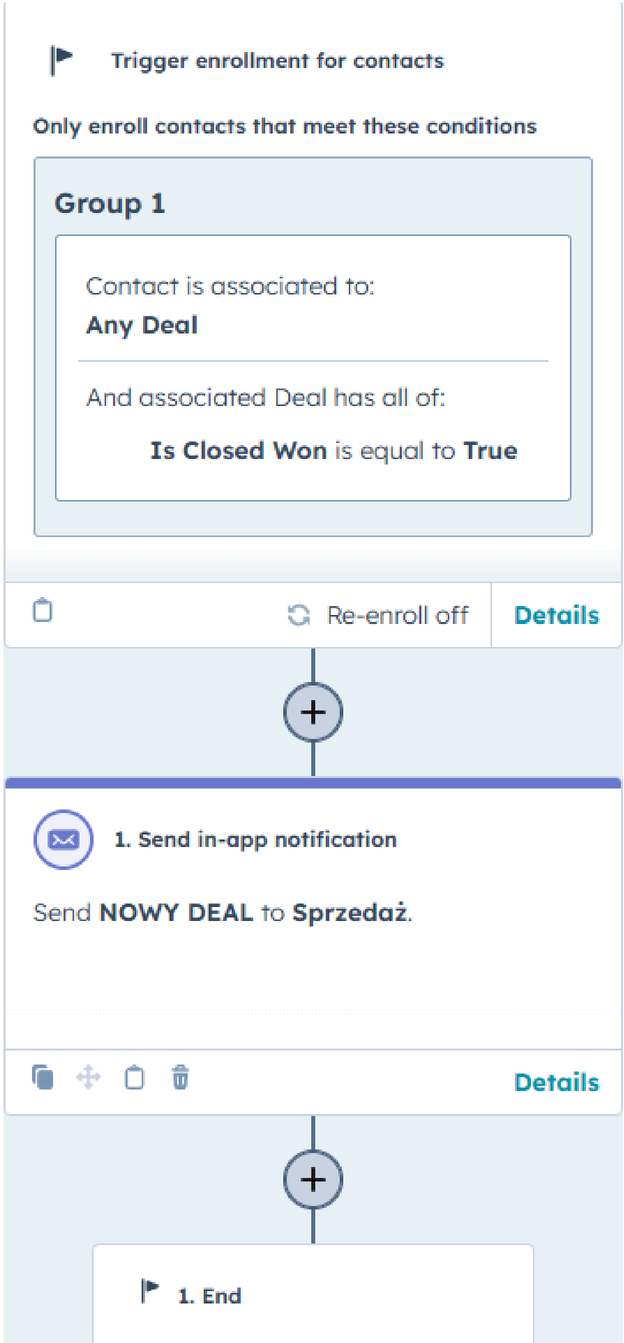
If the expected deal close date was more than 1 day ago and the deal has not been closed, the system automatically creates a task for the owner requesting an update.



💡 **Benefit:**
Salespeople don’t forget about deals. They always know when they need to follow up with a client or update the status.

🎉 6. Notification After Winning a Deal

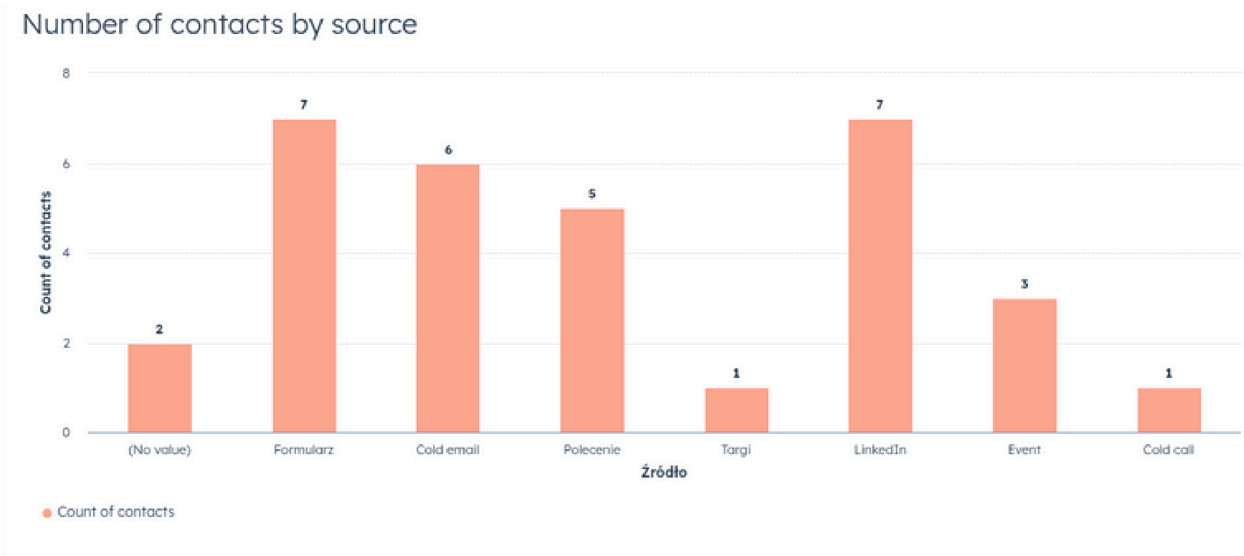
When a deal is marked as “Closed Won,” an **internal notification** is automatically sent to the sales department with congratulations and details about the won deal.



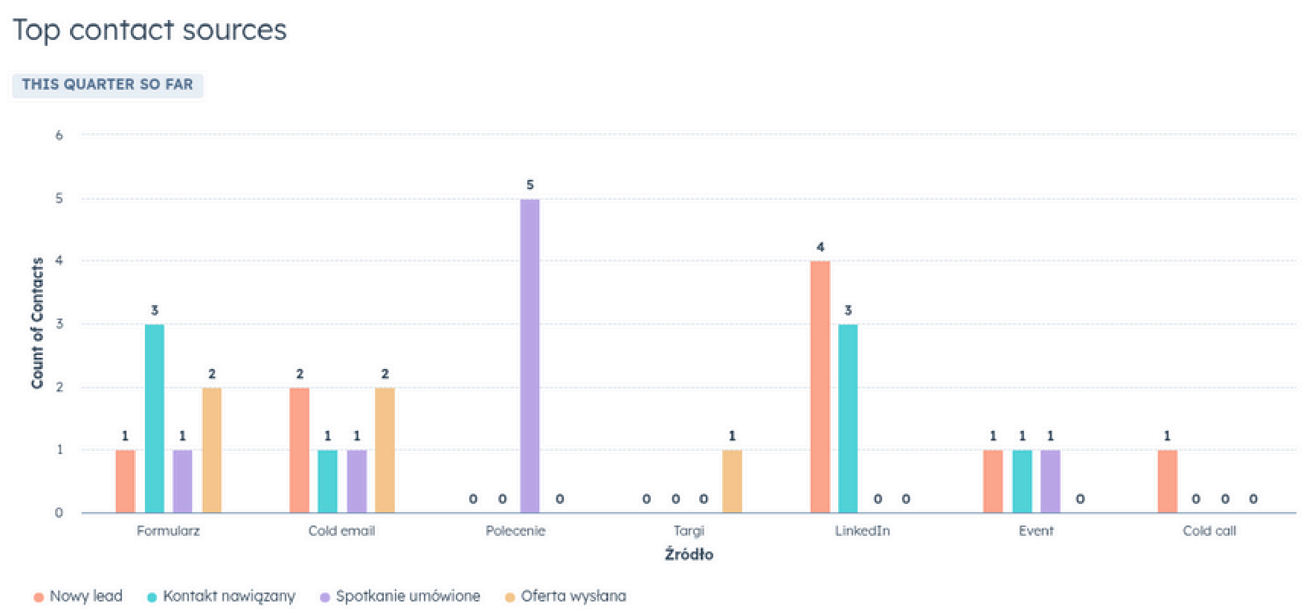
💡 **Benefit:**
An extra reward :)

Reports:

This report shows the sources of all contacts in the CRM system – e.g., cold call or form submission. Thanks to this analysis, it’s **easy to identify** which marketing channels generate the most traffic, allowing for **better decision-making.**
✅ Benefit: You know which activities attract the largest number of potential clients.



This report not only shows the sources of contacts but also **how far those leads progress in the sales process.** It helps identify sources that generate the most engaged contacts – for example, those that move to the meeting stage or receive an offer.
✅ Benefit: You see not only the quantity but also the **quality of leads** from each source – allowing you to focus on the most promising ones.



This summary measures the effectiveness of sources not at the contact stage, **but where it really matters – in opportunities and customers.**